Executing, Monitoring/Controlling, and Closing Projects

or
How Do We Get There From Here?

Dell Ford, PMP

Did We Really Learn This in School?

- During the Renaissance America began. Christopher Columbus was a great navigator who discovered America while **cursing** about the Atlantic. His ships were called the Nina, the Pinta, and the **Santa Fe**. Later the Pilgrims crossed the Ocean, and this is known as **Pilgrims Progress**. When they landed at Plymouth Rock, they were greeted by the Indians, who came down the hill **rolling their war hoops** before them. The Indian squaws carried **porpoises** on their back. Many of the Indian heroes were killed along with their **cabooses**, which proved very fatal to them. The winter of 1620 was a hard one for the settlers. Many people died and many babies were born. Captain John Smith was responsible for all this.

Joseph Lederer

-

What are we going to do?

- Determine your expectations for this section
- Discuss the major activities of project execution, controlling and closing projects
- Talk about the importance of managing change
- Practice our newly acquired project management skills using a real life case study.
- Assess the degree to which your expectations have been met

Overlap of Process Groups in a Phase*

Figure 3–2. Overlap of Process Groups in a Phase
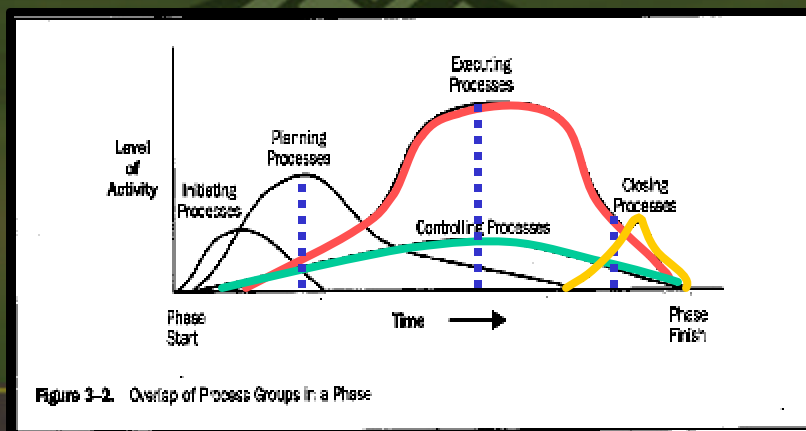
*A Guide to the Project Management Body of Knowledge (PMBOK® Guide) 2000 Edition

What Happens in the Project Managing Stage?

- Project Managing Activities – Execute the Project Plan

  1. Manage Risk
  2. Communicate Information, Report Progress
  3. Manage Schedule, including Milestones
  4. Document the Work Results, Deliverables, Effort Required.
  5. Lead/Manage Organizational Change
  6. Lead/Manage Project Change, including change requests
     Political Skills – Agency and Governmental
     People Skills
     Systems Skills
     Business Skills
     Know and Use Basic Change Management Strategies

What Happens in the Project Managing Stage (cont.)

- Project Managing Activities

  7. Manage Scope
  8. Manage Quality
  9. Manage Costs
  10. Manage Issues
  11. Conduct Status Review Meetings
  12. Review Project Life Cycle Phase Checkpoints
  13. Execute the Procurement Plan, including solicitations and contracts
  14. Administer Contract/Vendor Relations
  15. Update Project Planning Documents
  16. Establish Final Acceptance Process

Key Point: In Project Execution, Managing Change is One of the Key Issues

Types of Change

- Project Change
  - Variation
  - Foreseen Uncertainty
  - Unforeseen Uncertainty
  - Chaos
- Organizational Change
  - Technology-led change
  - Performance improvement
  - Transformational change
  - Organizational-led restructuring
 - Culture and behavior-led transformation

Types of Changes in Projects*

Variation – general influences and conditions that may reshape the project's implementation.

Foreseen Uncertainty – The identifiable and known uncertainties that may or may not take form.

Unforeseen Uncertainty – The uncertainties that can't be identified or isolated or understood in advance.

True Chaos – The environment in general is not at all predictable, and goals themselves may change.
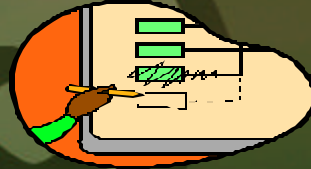
Earned Value Management

- Actual Cost – actual cost of work performed
- Planned Value – budgeted cost of work scheduled
- Earned Value – budgeted cost of work performed
- Cost Performance Index
- Schedule Performance Index
- ETC – estimate to completion
- BAC – budget at completion
- VAC – variance at completion

- Variation is to be expected and planned for

How to Control Change…

• **You must PLAN and LEAD IT!!!!**

How to Control and Lead Project Change

Project Dynamics	Leadership Roles	Tasks & Actions	Integration Role
Variation	Task Master	Plan Control to Your Baseline	**Metric Review – Earned Value (EV), Actual Costs (AC), etc.**
Foreseen Uncertainty	Plan A + Plan B	Track & Shift (Contingency Plan)	**Coordination**
Unforeseen Uncertainty	Improvisation and Workaround	Rapid Response (Reserves and Workarounds)	**Mobilization**
Total Chaos	**Orienteering**	Rapid Learning (Project Re-planning)	**Connectivity and Networking**

DeMeyer, Loch and Pich Sloan Management Review (MIT Winter 2002)

Successful Project Management

Each orienteer is given a 1:50,000 topographic **map (Project Plan)** with the various **control points circled (milestones)**. Each point has a flag marker and a distinctive punch (**phase review**) that is used to mark the scorecard. Competitive orienteering involves **running** from **checkpoint to checkpoint (Executing the plan)**. It is more demanding than road running, not only because of the **terrain (changing environment)**, but because the orienteer must constantly **concentrate (focus)**, **make decisions (lead)**, and **keep track of the distance covered (metrics)**. Orienteering challenges both the mind and the body; however, the competitor's ability to **think under pressure** and **make wise decisions** is **more important than speed or endurance**.

Organizational Change

– Technology-led change
– Performance improvement
– Transformational change
– Organizational-led restructuring
– Culture and behavior-led transformation

Key Elements of Successful Organizational Change*

- Committed and Active Participation of Leadership
- Culture Change
- Energetic Involvement of an Empowered and Educated Workforce
- Effective Communication and Measurement
- Aligning Human Resources Systems with the Goals and Objectives of Change

"Organizational Change: Managing the Human Side", American Productivity and Quality Center, 1999.

How Do We Plan To Change the Organization?

- Systems Thinking – our decision, actions, and plans impact throughout the organization in ways that we may not think about, especially if we view our "solutions" to "problems" as isolated from the way the rest of the organization works.
- Mental Models – our decisions, actions, and plans come from models that we have in our head; these models can be incomplete, inaccurate, and unrelated to the issues that we now confront.
- Personal Mastery – the "organization" is what we call a number of individuals trying to do something together; there is no perfection of the whole without the improvement of the individual.
- Shared Vision – the emphasis here is on "shared"; organizational members understand and agree to work towards a common objective.
- Team Learning and Dialogue – it's a "messy" process; we will learn and share what we learn, one to another as we try to improve.

-   Peter Senge

Effective Communication and Measurement

- Communication is the way management delivers vision and strategy to work force.
- Communication is a means to developing understanding.
- Communication is a two-way dialogue.
- Metrics provide a common language for communicating.

Alignment

- Strategic Plan and IT plans
- Program Plans and Strategic Plans
- Program Plans and IT plans
- Human Resource Systems with the Goals and Objectives of Change

Change Wisdom

- We will often limit ideas and possibilities for improvement because we already think we know the answers.
- By limiting our thinking, we are limiting our possibilities and innovations as well as limiting the self-esteem that comes from successful accomplishment of change and the rewards of self-improvement.
- Our beliefs make it difficult to see what is obvious, and that prevents us from improving.
- BE OPEN TO THE POSSIBILITIES!!!
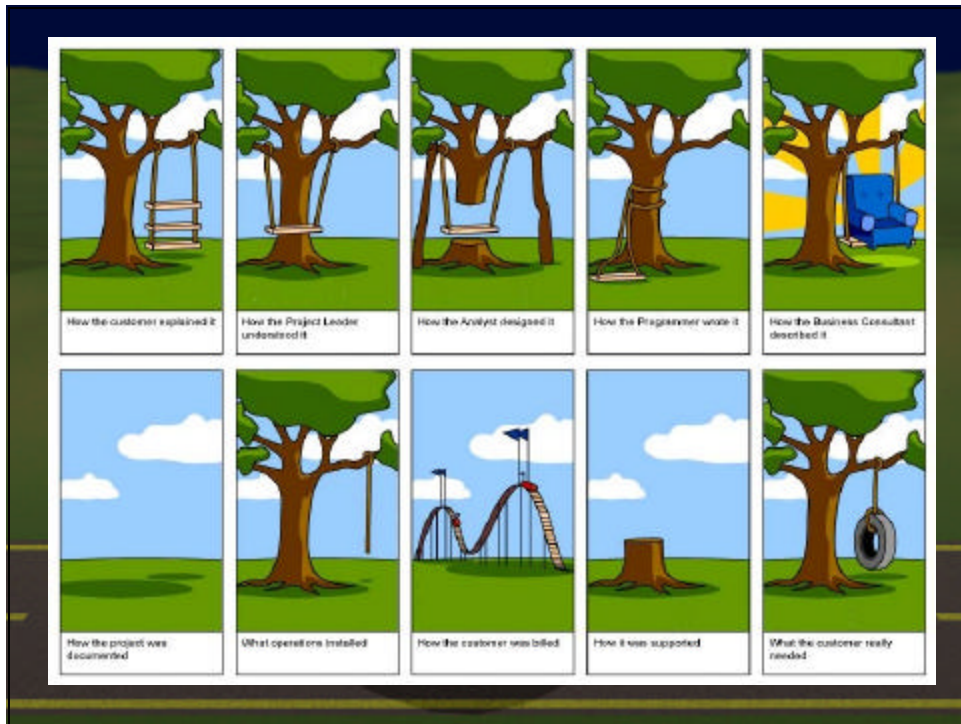
- by **Scott J. Simmerman, Ph.D.**
  © Performance Management Company, 1997 - 1999

# The Key to Organizational Change

Metanoia

Shift of the Collective Mindset

The tree swing cartoon, with panels labeled:
- How the customer explained it
- How the Project Leader understood it
- How the Analyst designed it
- How the Programmer wrote it
- How the Business Consultant described it
- How the project was documented
- What operations installed
- How the customer was billed
- How it was supported
- What the customer really needed

Project Management and Execution – Westgate Bridge Collapse – A Case Study

Westgate Bridge Collapse - 1970

Project Close-Out
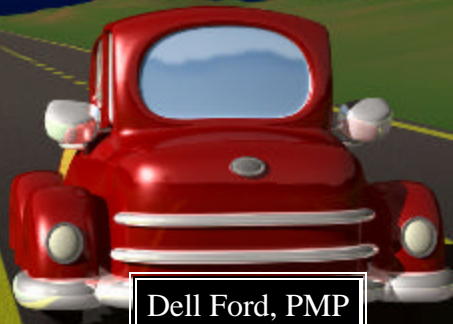
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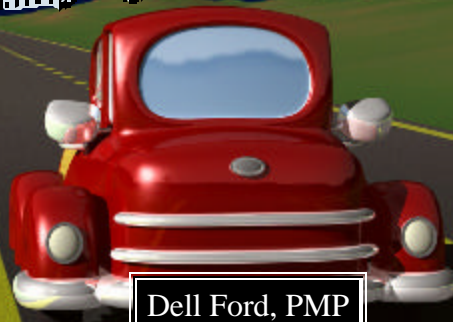
Dell Ford, PMP

No Respect!!!

Close-Out is the Rodney Dangerfield Process of Project Management!!

Key Point

The Client determines when a project is completed. The Project Manager demonstrates that the deliverables meet client specifications.

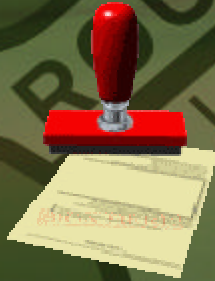Dell Ford, PMP

Acceptance

- Two Types:
  - Ceremonial Acceptance
  - Formal Acceptance
- Ceremonial acceptance is informal sign-off by the client
  - Conference occurs on a specific date
  - Planning and taking a vacation

Acceptance Should be a Gradual Process

We'll see you when we are done!!!!

Welcome
Applications Development

Formal Acceptance

- Obtain client's sign-off throughout the project (80 Hour Rule)
- Written acceptance process established early on in the project
- Conduct final test jointly with client
- Get final sign-off

Two Types of Closure

- **Contract Closure**
- **Administrative Closure**

Why Document the Project?

- Reference for future work/changes to deliverables
- Historical record for estimating future duration, cost, resources, etc.
- Training resource for new project managers
- Development of project team
- Input for performance evaluations

Contract Close-Out

- Completion and settlement of the contract including resolution of any open items
  - Product Verification
  - Product Acceptance
  - Final Payment
- Archive contract records
- Update historical databases
- Document lessons learned

Administrative Close-Out

- Consists of:
  - Generating
  - Gathering
  - Archiving
  - Disseminating information
- Resolving Open Issues
- Conducting a Post-Implementation Audit

Key Point

Administrative close-out is much easier to perform if completed at the end of each project phase.

Dell Ford, PMP

Project Documentation

- Project Charter
- Work breakdown structure
- Minutes of project meetings
- Status reports
- Change requests
- Payment schedules

- Written communications
- Client acceptance documents
- Interim and final reports
- Post-implementation audit report
- Lessons learned
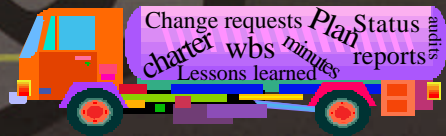
Celebrate Success!!!

Were your expectations met?

- Assess the degree to which your expectations have been met

Project Management Resources

www.cio.sc.gov
IT Project Management

Questions???

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